The FSCM 9.2 Upgrade to PeopleSoft introduced a new functionality called Chartfield Request. This functionality allows an end user to request a chartfield be added to the configuration. The request is then routed through approvals before being automatically added to the configuration tables. This new process will maintain a clearer audit trail for new chartfields being added.

The following chart of accounts will be entered by Division of Accounts:

- 5 digit department with agency business unit
- Account with SetID of SHARE
- Fund with SetID of SHARE

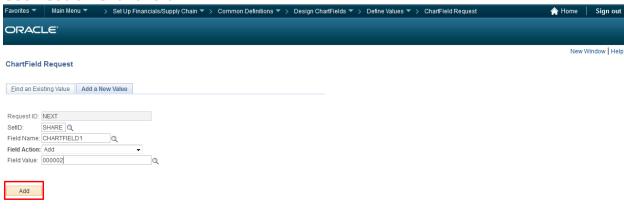
The following chart of accounts will be entered by agency users under the roll of TN2_GL_AGENCY_GL_SPECIALIST

- UserCode 6 digits
- Location 5 digits with 1st two being County
- Program 6 digits
- 10 digit department new 10 digit departments must contain payroll and an attachment explaining the necessity for the new department

Creating Chartfield Requests

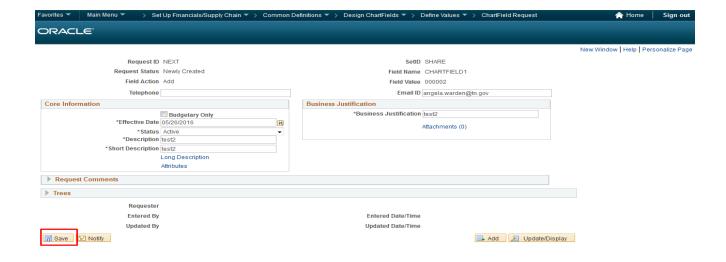
Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a New Value

User Code - Chartfield1



Find an Existing Value | Add a New Value

- 1. On the Chartfield Request page Click the tab "Add a new value"
- 2. Request ID: NEXT this will pre-populate and will be grayed out
- 3. SETID Enter Agency BU
- 4. Field Name Click user code field to be added
- 5. Field Action Click Add
- 6. Field Value Enter the new chartfield value to be added = 6 digits
- 7. Click Add



On the next screen – the following fields will default based on setup and populate the required fields –

- 8. Email ID the users State email address will default
- 1. Core Information
 - Effective Date =
 - Status = Active
 - Description = 30 Characters
 - Short description = 10 Characters
- 2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
- 3. Click Save
- 4. Request Action dropdown Click submit for approval and click Go

After the user clicks **Go** the request will be routed to the Division of Accounts approver. The approver will review and either approve or deny the request. If the request is approved, the user code will be added into Edison. If denied, the request will be routed back to the user with comments on why it was denied. The user will either fix the issue from the approver's comments or can cancel the request if needed. Cancelling a request is explained later in this manual.



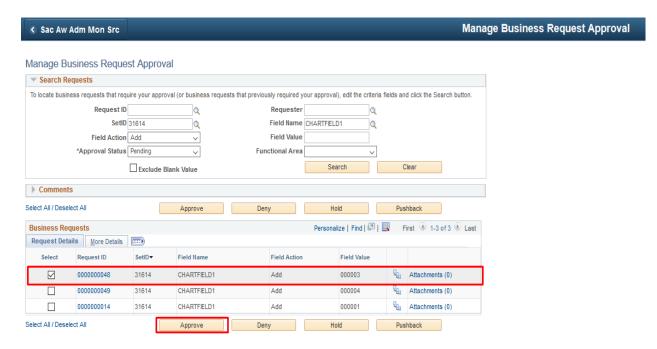
There are 3 methods in approving a chartfield request that has been submitted (1) Business request approval (2) worklist and (3) Email

(1) Approving Chartfield Request Navigation through Business request approval

FSCM > Setup Financials/Supply Chain > Common Definitions > Business Request Configuration > Business Request Inquiry

Note – appover can review multiple requests at a time.

Business Request Approval

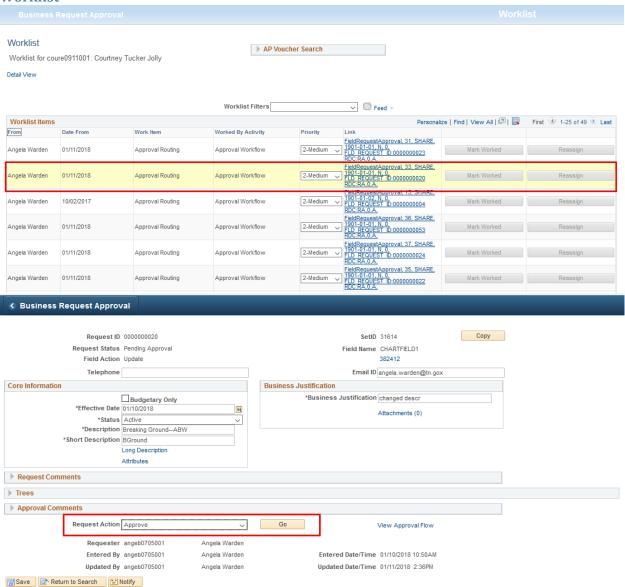


(2) Approving Chartfield Request Navigation through approvers Worklist

FSCM >



Worklist



(3) Approving Chartfield Request Navigation through Email link

You can navigate directly to the Field Request entry page for more information by clicking the link below.

https://sso-

uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE FIELD REQUEST.FLD REQ APPROVAL&Action=U&FLD REQUEST ID=0000000169



Updating Existing Chartfield Requests

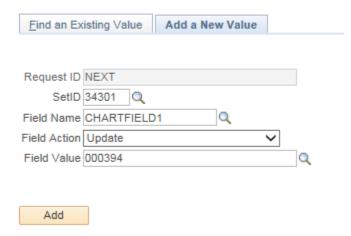
There are two ways to update an existing chartfield (1) Chartfield equest and add a new value (2) Chartfield request and copy function.

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield

Request > Add a New Value

- 1. On the Chartfield Request page Click the tab "Add a new value"
- 2. Request ID: NEXT this will pre-populate and will be grayed out
- 3. SETID Enter Agency BU
- 4. Field Name Click user code field to be added
- 5. Field Action Click Update
- 6. Field Value Enter the existing chartfield value to be changed and /or inactivated
- 7. Click Add

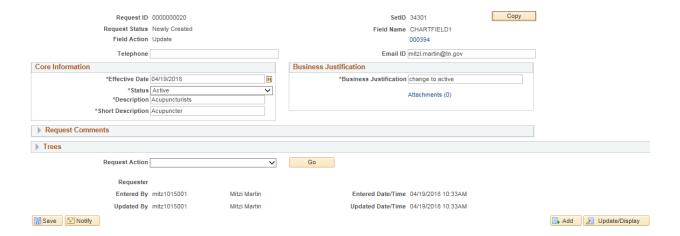
ChartField Request



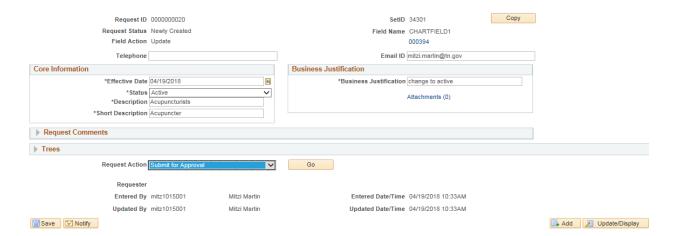
On the next screen – the following fields will default based on setup and populate the required fields –

- 8. Email ID the users State email address will default
 - 1. Core Information
 - Effective Date =
 - Status = Active / If chartfield is being inactivated choose inactive
 - Description = 30 Characters
 - Short description = 10 Characters
 - 2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
 - 3. Click Save





4. Request Action dropdown – Click submit for approval and click Go





Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a New Value

- 1. On the Chartfield Request page Click the tab "Add a new value"
- 2. Request ID: NEXT this will pre-populate and will be grayed out
- 3. SETID Enter Agency BU
- 4. Field Name Click user code field to be added
- 5. Field Action Click Update
- 6. Field Value Enter the existing chartfield value to be changed and /or inactivated
- 7. Click Add

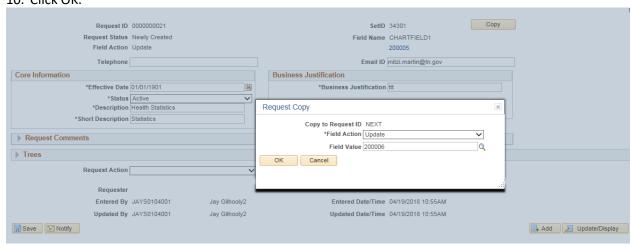
On the next screen - click COPY -

8. Email ID - the users State email address will default



9. Choose Update and the Field Value to be changed and or inactivated on the Request Copy box.

10. Click OK.





On the next screen – the following fields will default based on setup and populate the required fields –

- 12. Email ID the users State email address will default
 - 1. Core Information
 - Effective Date =
 - Status = Active / If chartfield is being inactivated choose inactive
 - Description = 30 Characters
 - Short description = 10 Characters
 - 2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
 - 3. Click Save
 - 4. Request Action dropdown Click submit for approval and click Go

